

## TAKING 60 PEOPLE ON A FULFILLING JOURNEY

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*This article has been edited for clarity from its original form in the February 2008 edition of the Value Times*

Ross was the lead process facilitator on a particularly large project, considering complex high-level issues and involving over 60 workshop participants.

The assignment was to undertake a review workshop of various aspects of the draft Project Definition Plan (PDP) for a major hospital proposed to be built on a greenfield site. The project journey had seen a considerable level of parallel studies and stakeholder consultation within what seemed to be an unachievable timeline. It was seen as imperative that there was understanding and ownership of the constituent parts of the PDP and the direction in which the project was heading. With Christmas approaching and the next key submission milestone to gain government endorsement to proceed following not long afterwards, this session was an imperative step to obtaining agreement on the direction of the project.

The review of the PDP in the workshop required input and ownership of an agreed direction from a range of stakeholders within key areas of government, various areas within the Department of Health as well as the design team, independent peers reviewing the project, and a range of eventual occupiers, users, partners and neighbours of the hospital.

The review workshop was a success due to the hard work undertaken by a range of project and facilitation team members in the pre-workshop preparation phase, the workshop phase itself and the post-workshop phase.

The following critical success factors were relevant to the success of the workshop and its outcomes:

### **Critical Success Factors and supporting actions**

- Focused preparation with constraints in mind (pre-workshop meeting with the project team and key stakeholders):
  - This was undertaken in a large team meeting to introduce the facilitation team to the project team and a number of the key stakeholders. This allowed the facilitation team to obtain an overview of the project and some of its key issues as well as obtaining an awareness of the project's key stakeholders and the current relationships. This meeting also allowed an appreciation of the key drivers for the workshop i.e. to highlight any major gaps in strategy or planning, ownership to the direction forward, etc
  - The major insight was into the expectations of the various key project stakeholders both in terms of workshop outcomes and process. This was not their first workshop experience for the project. Their attitudes and feelings on what did NOT work on previous workshop experiences provided context for addressing the workshop objectives, facilitation strategy and workshop logistics.
- Planning the event within the venue (workshop logistics, venue layout and arrangements):
  - The venue selected needed to be comfortable, have good air conditioning and be large enough to allow seating of a group of approximately 60 participants as well as technical reference-observers to sit at tables of 7-8 people
  - Audio-visual equipment needed to allow distant participants to be able to see projections at the front of the room so 3 large screens were employed. To ensure participants could hear the various people speaking, a fixed microphone was established for the presenters, a lapel microphone for the lead facilitator and two roving microphones handled by project team staff to enable questions from the workshop group
  - Two catering stations were required to allow easy and quick access to food and drinks during breaks. Enough time for breaks to allow people to have a drink, some food and use the facilities without feeling rushed, was essential
- A strategy to achieve expectations without complexity or undue haste (workshop objectives and developing an appropriate facilitation strategy):
  - It goes without saying that the workshop objectives needed to be realistic and achievable within the timeframe set for the workshop and take into account the number of workshop participants needing to contribute. There was a strong need to align expectations with realistic outcomes. We were fortunate to have an informed client who was aware of this and allowed a change to the workshop objectives to ensure they were achievable within the timeframe
  - Having listened to the various views at the pre-workshop meeting, a facilitation strategy was developed to allow the large number of participants to contribute in the workshop, to be involved, to feel involved, and ensure that the workshop objectives were achieved. Also to be able to witness that the implicit workshop objectives, stated as workshop drivers, were addressed i.e. highlight any major gaps in strategy or planning and to achieve ownership to the direction forward
  - The facilitation strategy was to have participants pre-allocated to seating at the tables and this was determined by the project team i.e. groups of approximately 7 to 8 people being a mix of stakeholder

groups to ensure a cross section of input at each table. A project team member was also seated at each table to provide further clarification of information, if needed

- The strategy was explained at the pre-workshop meeting for comment, acceptance and ownership of the process by key stakeholders. The workshop strategy would be a series of presentations on key areas of the PDP (e.g. health services planning, site masterplanning, facility profile) by appropriate project team members. A participatory workshop component after the presentations took place
  - Clear guidance was provided to presenters on the framework and time limits for their presentation to ensure that the workshop information was fluent and allowed enough time for participants to comment and contribute
  - The workshop sub-tasks were kept simple and transparent. Pre-prepared sheets with a question pertaining to the key area of review were distributed to each table for recording that table's comments. The task of recording the table's comments for each area of the PDP was shared around the various table members as the workshop proceeded. This ensured that not just one person recorded information but the workload was shared and added to the concept of a team approach – this was a learning from previous workshop experiences expressed by the client
  - The table's comments, issues, etc were collected and shared with the whole workshop group for further comment, questioning and assessment of the table's comments using a simple assessment process (i.e. does this issue need to be resolved before the project moves forward to the next step, or can it be resolved as the planning process proceeds and not delay the project, or has it already been resolved?). Consensus would be sought on the assessment of each issue raised. Items requiring resolution would be put on an action plan to be addressed by the project team. The whole group then drew conclusions on the particular area of the PDP under review before proceeding to the next area
- Keeping the path simple and clear (while running like mad behind the scenes) – Workshop Phase:
    - Having clear instructions for the workshop and ground rules at its commencement was important i.e. format of workshop, philosophy of workshop, context, timing of breaks, use of microphones, etc. Also clear instructions for each workshop task with an announced time limit ensured smooth running of the agenda
    - Frequently referring to the workshop objectives and agenda and where we were in relation to it, after each break, provided participants with a measure of knowing the workshop was on track as well as what they had achieved to date and what was still required to be done
    - Having members of the project team willing and able to assist in the logistics of running the workshop was a critical success factor. Members of the project team assisted with live capture of comments into action plan lists, drawing conclusions for later presentation back to the group, managing the roving microphones between the tables when questions were being asked, ensuring catering was ready when breaks were taken, etc. This proved immeasurably beneficial and its contribution to the success of the event cannot be underestimated. When dealing with large groups this level of unseen assistance ensures the group can concentrate on the workshop rather than being distracted by peripheral matters
  - Maintaining momentum and excitement (post-workshop phase):
    - The process of capturing information in a structured way allowed a quick turn around time in reporting which was a requirement of the assignment. This was also a critical success factor because of the closeness of Christmas and the project approval timeline.